Greetings Placer County Workday Users!

We are excited to announce the newest version of Workday, version 2021 R2, will be live on September 11th!

As a reminder, Workday is a Software as a Service (SaaS) product, and as such, provides users both required and optional system updates semi-annually. Required updates are configured, integrated into existing functionality, and tested by the Workday Support Organization and Business Process Owners prior to release. Optional updates are reviewed with Business Process Owners to decide whether implementation is warranted. The purpose of this communication is to inform users of changes with the September 11th implementation of Workday 2021 R2.

Most users will experience various look and feel changes that will not impact functionality. New fields may appear. If they are required for the business process they will be marked as such. Otherwise, these new fields can be utilized to provide more detail but will not be a system requirement for completion of the business process to which they are associated. Below you will find a summary of the most impactful changes grouped by functional area and further below you will find the master list of all changes to expect with the release of Workday 2021 R2.

In conjunction with the release of Workday 2021 R2, all job aids and training materials will be updated. We encourage users to utilize these tools to familiarize yourselves with new features or existing features that may have moved within Workday. Updated Financial job aids will be available **here** and HCM, Employee Self Service, and Time Tracking job aids can be accessed **here**.

If you have questions, we are happy to help! Please contact us via phone at (530) 889-4199 or via email at workdayhelp@placer.ca.gov.

New features include but are not limited to the following:

Enterprise Interface Builder (EIB)
- ➢ Journals EIB
  - o Placer Import Accounting Journal 2021r2 EIB has been created to allow for inclusion of the contract ID on journal transactions submitted via EIB. This new EIB will be available here, on the Workday Help website, on September 11th and will replace the previous Journal EIB, Placer Import Accounting Journal 2021r1, which will remain available until September 18th to give you the opportunity to prepare for this change.

Expense Review and Approval
- ➢ Grid View on Expense Inbox Items
  - o Workday continues to improve the expense report experience by automatically enabling grid view on the Approve Expense Report Inbox task, ensuring you can quickly and efficiently manage expense reports awaiting your review.

- ➢ Expense Report Work Area
  - o Workday 2021r2 delivers a new expense report work area that streamlines how expense report reviewers and approvers identify expense reports that require attention. With search, sort, and filter capabilities, this feature makes it easier for reviewers and approvers to organize and prioritize work, e.g., sort by employee name, expense report amount, if an expense report was returned previously, etc. To access, simply search Expense Report Work Area in the Workday search box.

Time Entry

- ➢ View Absence Balances Button
  - o To provide a more consistent user experience on the Time Entry Calendar, the View Absence Balances button has moved and is now a selection on the Actions button menu. Now all user actions are located on the Action button on the Time Entry Calendar.

Time Reports

- ➢ Terminated Workers Check Box
  - o A new check box will now appear on all time related reports allowing users to include terminated workers in their report results. Prefer not to see terminated workers, no problem, just leave the check box unchecked and you will get results similar to what you would get prior to the release excluding terminated workers. Workers will be considered terminated based on their status in Workday as of the report run date and not your parameter date. For example, if a worker is currently terminated, but the user is running the report for a period in which the worker in question was still employed, the user must check the terminated box because the current status of the worker is terminated.

User Experience

- ➢ Report and Task Filter Focus
  - o Workday 2021r2 makes it easier to complete tasks in Workday with Report and Task Filter Focus. With Workday 2021r2, when you access a report or task that includes a filter prompt, Workday will bring the filter prompts to the forefront of your screen while graying out the main task that was displayed in the background. When you complete your prompts, Workday brings the main task or report back into focus.

- ➢ Global Header Redesign
  - o In an effort to make navigating Workday easier, Workday 2021r2 introduces various changes to the Workday header. The search bar has been moved to the center of the header and has increased in width, and the notification and inbox badging color has changed from orange to red.

- ➢ Contextual Search Category Buttons
  - o Improving how you find what you need to do your job, Workday 2021r2 introduces Contextual Search Category Buttons. Now, when searching for items, users can select categories such as People, Tasks and Reports, and Drive, eliminating out-of-context search results.

Master List of All Changes

Feature	Feature Description	Functional Area(s)	New Functionality Title	New Functionality
Aggregate Retro Result Lines by Pay Component on Payslips	Workday 2021R2 delivers a new configuration option that enables you to aggregate retro result lines by pay component on payslips, providing more flexibility and clarity. Note: This functionality is available only for the U.S., UK, and Canada payroll payslip configuration.	Core Payroll Integration	Retro Result Lines on Integrations	We update these integration templates to ensure that retro result lines are summarized on the integration output: • ADP Check Print (Enhanced Performance) • ADP Check Print Template (DO NOT USE) • Core Connector: Payroll Check Printing (Enhanced Performance) • Core Connector: Payroll Check Printing Connector (DO NOT USE) • WPN – Ceridian Check Printing
Attachments on Ad Hoc Bank Transactions and Ad Hoc Payments	With this release, we now enable you to add or change attachments using related actions on ad hoc bank transactions and ad hoc payments. This streamlines the process by eliminating the need for additional business process approvals and unnecessary accounting changes.	Cash Management	Ad Hoc Bank Transaction Attachments	Workday delivers a new Add/Change Attachments for Ad Hoc Bank Transaction task (secured to the Process: Ad Hoc Bank Transaction domain) that you can access from the related actions menu of ad hoc bank transactions. On the task, you can upload or delete attachments without the need for business process approvals.
Benefits Performance	Workday continues to improve benefits functionality, increasing performance for existing tasks and reports to help make your workflows faster and more efficient.	Benefits	Cancel Open Enrollment Background Job	To improve performance, we change the Cancel Open Enrollment task to a background job.
Benefits Performance	Workday continues to improve benefits functionality, increasing performance for existing tasks and reports to help make your workflows faster and more efficient.	Benefits	Open Enrollment Status Report	With this update, we improve the performance in the Open Enrollment Status report by no longer including the Completed Events grid in the default view. To view completed events, you click the new View All Open Enrollment Events button on the report. The new button enables you to run the new Active and Open Enrollment Status report (secured to the Manage: Benefits for Organizations domain).

Book-to-Bank Summary Reports	Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences.	Cash Management	Book-to-Bank Summary Composite Report	We deliver a new Book to Bank Summary composite report (secured to the Report Execution domain) that enables you to compare bank-reported balances against ledger bank balances in a summarized, high-level format. Using key metrics, you can identify the root causes of discrepancies between the balances for a specified company or company hierarchy, period, and bank accounts. The report displays colored indicators to help you easily distinguish which bank accounts have inconsistent balances from those that are fully reconciled. You can use this report to perform a thorough book-to-bank reporting analysis to meet audit and management reporting requirements.
Book-to-Bank Summary Reports	Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences.	Cash Management	Bank Account Balances Report	We deliver a new Book to Bank Summary - Bank Account Balance report that displays the prior day ending bank balance in bank account currency using the latest noncancelled bank statements for a selected period. You can use the report to assess your ending bank balance for the selected company or company hierarchies, period, and bank accounts. You can also drill down on a prior day ending bank balance for a bank account to: • Compare the beginning and ending ledger balances. • View the bank statement summary of the opening and closing ledger amounts and transaction details. • View the number of unreconciled bank statement lines. We secure the report to these domains: • Process: Bank Reconciliation • Process: Bank Statement - Reporting • Reports: Cash Forecast Reporting • Set Up: Bank Entity You can access the new report as a subreport on the new Book to Bank Summary composite report.

| Book-to-Bank Summary Reports | Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences. | Cash Management | Cross Period Reconciled Bank Statement Lines Report | We deliver a new Book to Bank Summary – Cross Period Reconciled Bank Statement Lines report that displays the reconciled cross-period bank statement lines for a selected period. The bank statement lines are reconciled to operational transactions with an accounting date that falls in either the selected or earlier period.

We secure the report to these domains:
• Process: Bank Statement - Reporting
• Reports: Cash Forecast Reporting

You can access the new report as a subreport on the new Book to Bank Summary composite report.

Example: You reconcile a transaction posted to the ledger in the selected period to its corresponding bank statement line that's recorded for the next period. You can use the subreport to determine if the transaction amount is the variance between the bank balance and ledger balance displayed on the Book to Bank Summary composite report for the selected period. |
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| Book-to-Bank Summary Reports | Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences. | Cash Management | Cross Period Reconciled Operational Transactions Report | We deliver a new Book to Bank Summary – Cross Period Reconciled Operational Transactions report (secured to the Process: Bank Reconciliation domain) that displays the reconciled cross-period operational transactions for the selected period. The operational transactions have an accounting date in a later period than the bank statement lines.

You can access the new report as a subreport on the new Book to Bank Summary composite report.

Example: You reconcile a bank statement line in the selected period to the reconcilable item that's posted to the ledger in the next open period. You can use the subreport to determine if this transaction amount is the variance between the bank balance and ledger balance displayed on the Book to Bank Summary composite report for the selected period. |

Book-to-Bank Summary Reports	Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences.	Cash Management	Reconcilable Items Stopped, Canceled or Escheated in Future Period Report	We deliver a new Book to Bank Summary - Reconcilable Items Stopped, Canceled or Escheated in Future Period report (secured to the Process: Bank Reconciliation domain) that displays: • Payments marked as stopped for a specified date range and company. • Reconcilable items marked as canceled or escheated for a future period. You can use the report to: • Take corrective actions on the payments marked as stopped. • View the reversal entries for canceled or escheated payments posted in a future period. You can access the new report as a subreport on the new Book to Bank Summary composite report.
Book-to-Bank Summary Reports	Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences.	Cash Management	Ledger Balance Report	We deliver a new Book to Bank Summary - Ledger Balance report (secured to the Reports: Financial Accounting domain) that displays month-end cash ledger balances in bank account currency for a specified period and company. You can use the report to: • View the ledger account balances for each of your bank accounts that are calculated as the sum of the transaction debit minus the credit. • Drill down on the balance for each journal source to view all transaction details. • Identify unreconciled cash journal lines to reconcile with bank statement lines. You can access the new report as a subreport on the new Book to Bank Summary composite report.

Book-to-Bank Summary Reports	Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences.	Cash Management	Uncleared Bank Statement Lines Report	We deliver a new Book to Bank Summary - Uncleared Bank Statement Lines report that displays unreconciled bank statement lines in a prior or current period. You can use the report to: • View all reconciled statement lines with unreconciled statement lines for a root-cause analysis on bank balance differences. • Drill down on bank statement lines to view the bank statement line details. You can also use the report to: • Create an ad hoc bank transaction for either the bank statement line amount or the difference between the statement line and a transaction. • Reconcile a bank statement line with the reconcilable item to clear the bank statement line. The report is secured to these domains: • Process: Bank Statement - Reporting • Reports: Cash Forecast Reporting You can access the new report as a subreport on the new Book to Bank Summary composite report.
Book-to-Bank Summary Reports	Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences.	Cash Management	Uncleared Operational Transactions Report	We deliver a new Book to Bank Summary - Uncleared Operational Transactions report (secured to the Process: Bank Reconciliation domain) that displays all uncleared reconcilable items in a prior or current period. You can use the report to: • View reconciled items with unreconciled items for a root-cause analysis on ledger balance differences. • Drill down on reconcilable item totals to view individual item details. You can also use the report to: • Create an ad hoc bank transaction for either the reconcilable item amount or the difference between the statement line and a reconcilable item. • Reconcile a reconcilable item with the corresponding bank statement line to clear the transaction. You can access the new report as a subreport on the new Book to Bank Summary composite report.

| Book-to-Bank Summary Reports | Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences. | Cash Management | Non-Operational Transactions Report | We deliver a new Book to Bank Summary - Non-Operational Transactions report (secured to the Reports: Financial Accounting domain).

The report enables you to:
• Assess the differences between ledger and bank balances.
• Review nonoperational cash journal lines posted to the ledger account in a prior or current period.
• View cash journal amounts for nonoperational transactions, such as manual or Accounting Center journals.

You can access the new report as a subreport on the new Book to Bank Summary composite report. |
| Book-to-Bank Summary Reports | Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences. | Banking and Settlement

Cash Management | Payments in Settlement | We deliver a new Book to Bank Summary - Payments in Settlement report (secured to the Process: Bank Reconciliation domain) that displays all settled payments in a prior or current period that are awaiting payment acknowledgement or are rejected by the bank. The payments are for bank accounts configured with required payment acknowledgements.

You can use the report to:
• View payments that are unreconciled based on a payment acknowledgement status.
• Determine the corrective action to take, such as canceling or reprocessing the payments, so that you can reconcile the cash ledger balances to your bank balances.

You can access the new report as a subreport on the new Book to Bank Summary composite report. |

| Book-to-Bank Summary Reports | Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences. | Cash Management | Cash Journals in Error | We deliver a new Book to Bank Summary - Cash Journals in Error report (secured to the Reports: Financial Accounting domain) that displays operational and nonoperational transaction journal lines posted to the cash ledger account with errors. We include all journal lines in a prior, current, or future period. For the types of errors in journal lines, we include missing ledger accounts or accounting status errors.

You can use the report to determine the root causes of differences between bank balances and ledger bank balances due to errors in the posted journal lines.

You can access the new report as a subreport on the new Book to Bank Summary composite report. |
| Book-to-Bank Summary Reports | Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences. | Cash Management | Book-to-Bank Summary Report Fields | We deliver these new report fields (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports to view book-to-bank details:
• Reconciled Group on the Bank Statement Line business object.
• Reconciled Group on the Reporting Recon Item business object.
• Tenanted Journal Source for Ad Hoc Bank Transaction on the Global business object. |
| Book-to-Bank Summary Reports | Workday delivers new, simplified book-to-bank summary reports that help streamline the book-to-bank reconciliation process. You can use the reports to easily identify discrepancies between bank balances and ledger balances as well as strategize how to best account for and reconcile any differences. | Cash Management | Book-to-Bank Summary Report Data Source Filters | We deliver these new report data source (RDS) filters (secured to the Process: Bank Reconciliation domain) on the Reconcilable Item RDS that you can use in custom reports:
• Future Reconciled Recon Items Filter. You can use the filter to view reconcilable items that are reconciled in a future period to bank statement lines recorded in the selected period at the line level.
• Payments in Settlement Filter (Awaiting Acknowledgement or Rejected). You can use the filter to view settled payments with a status of Awaiting Payment Acknowledgement or Rejected at the line level.

We also deliver a new Future Reconciled Bank Statement Lines Filter RDS filter on the Bank Statement Lines RDS, which you can use in custom reports for bank statement lines reconciled in a future period to reconcilable items posted in the selected period. We secure the new RDS filter to these domains:
• Process: Bank Statement - Reporting
• Reports: Cash Forecast Reporting |

Business Assets - Miscellaneous Enhancements		Business Asset Accounting Business Asset Tracking	Assets Report Fields	You can now use these report fields on the Taggable business object in condition rules for the Asset Registration Event business process: • Alternate Supplier Contract • Location • Spend Category • Supplier Contract
Change Purchase Orders without Creating Change Orders	You can now make minor changes on your purchase orders without creating change orders. This helps you quickly and easily correct and manage purchase order data.	Procurement	Edit Without Change Order	We deliver a new Edit Without Change Order task (secured to the Process: Purchase Order - Create/Edit domain) that you can access from the related actions menu of approved and issued purchase orders. The new task saves you time by enabling you to make changes to nonmonetary fields on purchase orders without the need to: • Create change orders. • Resubmit purchase orders for approval. Also, you can now use the Configure Optional Fields task to specify which fields to display and hide on the new Edit Without Change Order task. Note: When you trigger custom validations on purchase orders, we also display them on the new task.
Change Purchase Orders without Creating Change Orders	You can now make minor changes on your purchase orders without creating change orders. This helps you quickly and easily correct and manage purchase order data.	Procurement	Maintain Procurement Conditional Rules	We add a new Purchase Order - Prevent Edit Without Change Order option on the Maintain Procurement Conditional Rules task. With the new option, you can create conditional rules to prevent users from making minor edits on specific types of purchase orders, such as ones you import into Workday, on the new Edit Without Change Order task.
Change Purchase Orders without Creating Change Orders	You can now make minor changes on your purchase orders without creating change orders. This helps you quickly and easily correct and manage purchase order data.	Procurement	View Purchase Order Changes	We deliver a new View Purchase Order Changes report (secured to the Process: Purchase Order - Reporting and View: Organization Purchase Order domains), enabling you to now view the changes you make on purchase orders.
Consolidate Business Process Event Steps	With this release, we consolidate consecutive business process event steps with Not Required statuses within a business process event. This reduces the number of unnecessary business process event steps generated in your tenant and streamlines what you see in the event's process history.	Business Process	Multiple Steps Report Field	We deliver a new Event Step Has Multiple Steps report field on the Event Record business object (secured to the Public Reporting Items domain) that you can use to report on consolidated business process event steps. The report field returns true when the business process event step is associated with multiple steps.

Consolidate Business Process Event Steps	With this release, we consolidate consecutive business process event steps with Not Required statuses within a business process event. This reduces the number of unnecessary business process event steps generated in your tenant and streamlines what you see in the event's process history.	Business Process	Steps Report Field	We deliver a new Steps report field on the Event Record business object (secured to the Public Reporting Items domain). You can use the Steps report field to report on all steps from the business process definition that are associated with the business process event step. You can associate a business process event step with multiple steps from the business process definition if those steps were automatically skipped.
Consolidate Business Process Event Steps	With this release, we consolidate consecutive business process event steps with Not Required statuses within a business process event. This reduces the number of unnecessary business process event steps generated in your tenant and streamlines what you see in the event's process history.	Business Process	Workflow Step Security Group Report Field	We update the Workflow Step Security Group report field on the Event Record business object, enabling you to report on security groups associated with each step that's consolidated to an event record. We also update the report field description to clarify the purpose and use.
Consolidate Business Process Event Steps	With this release, we consolidate consecutive business process event steps with Not Required statuses within a business process event. This reduces the number of unnecessary business process event steps generated in your tenant and streamlines what you see in the event's process history.	Business Process	Get Event Details Web Service	We update the Get Event Details web service to return all business process event steps that are consolidated into 1 event record.

Consolidate Business Process Event Steps	With this release, we consolidate consecutive business process event steps with Not Required statuses within a business process event. This reduces the number of unnecessary business process event steps generated in your tenant and streamlines what you see in the event's process history.	Business Process	Event Process History	We consolidate consecutive business process event steps that have a status of Not Required within a business process event, improving performance and reducing the number of unnecessary business process event steps generated. An event record can now be associated with multiple business process steps. We update the Full Process Record report, enabling you to easily view details of consolidated business process event steps on the: • All Actions tab: When consecutive, not required event steps are consolidated, we display Multiple Steps - Not Required on the Event Record column. When there's more than 1 consolidated step, we display a numerical value on the Step column. The number represents how many steps were consolidated in that 1 event record. You can select the number to view a list of all consolidated steps. • Process tab: When there's more than 1 consolidated step, we display a numerical value on the Step column. The number represents how many steps were consolidated to that 1 event record. You can select the number to view a list of all consolidated steps. When you view an event, we display a numerical value on the Process History grid when there's more than 1 consolidated step. We also improve the user experience by updating the Process History section in an Inbox item. We display Multiple Steps - Not Required when the event step has a Not Required status and is consolidated.
Consolidate Business Process Event Steps	With this release, we consolidate consecutive business process event steps with Not Required statuses within a business process event. This reduces the number of unnecessary business process event steps generated in your tenant and streamlines what you see in the event's process history.	Business Process	Step Type Report Field	We deliver a new Step Type report field on the Event Record business object (secured to the Public Reporting Items domain) that you can use instead of the Step Type (Do Not Use) report field. When there are multiple steps on a business process definition associated with this event step, this report field returns the step type for each associated step.
Consolidate Business Process Event Steps	With this release, we consolidate consecutive business process event steps with Not Required statuses within a business process event. This reduces the number of unnecessary business process event steps generated in your tenant and streamlines what you see in the event's process history.	Business Process	Renamed Event Record Report Fields and Descriptions	We append (Do Not Use) to these report fields on the Event Record business object and update their descriptions in preparation for their retirement in a future update: • Order • Task We also update the description of the Parallel Step Inbox Order report field to clarify its purpose and use.

Consolidate Business Process Event Steps	With this release, we consolidate consecutive business process event steps with Not Required statuses within a business process event. This reduces the number of unnecessary business process event steps generated in your tenant and streamlines what you see in the event's process history.	Business Process	Order and Task Report Fields	We deliver these new report fields on the Event Record business object (secured to the Public Reporting Items domain) to replace the Order (Do Not Use) and Task (Do Not Use) report fields: • Order: When there are multiple steps on a business process definition associated with an event step, this report field returns the order for each associated step. • Task: When there are multiple steps on a business process definition associated with an event step, this report field returns the task for each associated step.
Consolidate Business Process Event Steps	With this release, we consolidate consecutive business process event steps with Not Required statuses within a business process event. This reduces the number of unnecessary business process event steps generated in your tenant and streamlines what you see in the event's process history.	Business Process	Steps Report Field	We append (Do Not Use) on the Step report field in preparation for its retirement in a future update. The Step report field doesn't return all the steps on the business process definition that are associated with the business process event step. We recommend that you use the new Steps report field on the Event Record business object.
Consolidate Business Process Event Steps	With this release, we consolidate consecutive business process event steps with Not Required statuses within a business process event. This reduces the number of unnecessary business process event steps generated in your tenant and streamlines what you see in the event's process history.	Business Process	Step Type Report Field Rename	We append (Do Not Use) on the Step Type report field in preparation for its retirement in a future update. We recommend that you use the new Step Type report field on the Event Record business object.
Contextual Search Categories	With Workday 2021R2, we enable you to use categories to search for specific items and filter results, reducing the number of out-of-context search results.	User Experience	Contextual Search Category Buttons	With Workday 2021R2, we enable you to use categories to search for specific items and filter results, reducing the number of out-of-context search results. We provide these new buttons: • Drive • Learning • People • Tasks and Reports

Correct Supervisory Organization on Hire	Workday enables you to automatically reassign Inbox items awaiting action after correcting the supervisory organization on the Hire business process, reducing manual effort.	Staffing	Automatically Reassign Inbox Items	We deliver a new Automatically Reassign Inbox Items check box in the Staffing section on the Edit Tenant Setup - HCM task. This enables you to have Workday automatically reassign Inbox items awaiting action after you correct the supervisory organization on the Hire business process. To use this functionality, you must first select the Correct Supervisory Organization on Hire check box. Note: Reassignment security permissions for the impacted events aren't individually assessed. The ability to reassign Inbox items awaiting action requires administrators to have permission to access the Correct action on the Hire business process security policy.
Customer Segmented Security for Printed Customer Invoices	To improve security and data integrity, you can no longer access the printed customer documents when the user doesn't have access to the customer segment for the invoice that they are viewing.	Customer Accounts	Segmented Security for Printing Runs and Attachments	We provide improved security for printing runs and attachments on these tasks and reports: • Email Customer Invoice • Print Dunning Letters • Schedule Print Customer Statements • Schedule Print Dunning Letters • View Customer Invoice • View Customer Invoice Adjustments • View Consolidated Invoice • View Customer Statement Printing Run • View Dunning Letter Printing Run Group You can now configure the security on those tasks and reports at a more granular level with segmented security, giving you more control over which invoices your users have access to.
Customer Segmented Security for Printed Customer Invoices	To improve security and data integrity, you can no longer access the printed customer documents when the user doesn't have access to the customer segment for the invoice that they are viewing.	Customer Accounts	IBAN for Bank Account for Lockbox Report Field Security	We now secure the IBAN for Bank Account for Lockbox report field to these domains instead of the Public Reporting Items domain: • Reports: Customer Documents • Reports: Customer Invoice This enables you to grant access at a more granular level.
Detect and Display Duplicate Suppliers	We expand the criteria you can use to detect potential supplier duplicates when you create new suppliers to include key pieces of supplier information. This enables you to more easily prevent duplicating supplier information while increasing the efficiency of supplier maintenance, improving the accuracy of your supplier records.	Suppliers	Tenant Setup for Supplier Duplicate Detection	We add a new Select Fields to Use to Detect Duplicate Suppliers option in the Procurement Options section on the Edit Tenant Setup - Financials task. This enables you to select key pieces of supplier information, such as Supplier Contact Email and Bank Account, to use to find potential duplicates on these business processes: • Create Supplier • Create Supplier Request • Create External Supplier Request

Detect and Display Duplicate Suppliers	We expand the criteria you can use to detect potential supplier duplicates when you create new suppliers to include key pieces of supplier information. This enables you to more easily prevent duplicating supplier information while increasing the efficiency of supplier maintenance, improving the accuracy of your supplier records.	Suppliers	Find Supplier Duplicates Standard Report	We add a new Find Supplier Duplicates report (secured to the Reports: Supplier domain) that you can use to detect and view potential duplicates of supplier records.
Detect and Display Duplicate Suppliers	We expand the criteria you can use to detect potential supplier duplicates when you create new suppliers to include key pieces of supplier information. This enables you to more easily prevent duplicating supplier information while increasing the efficiency of supplier maintenance, improving the accuracy of your supplier records.	Suppliers	Refined Searches for Supplier Duplicates	We now exclude parent or child suppliers on supplier hierarchies when you run the new Find Supplier Duplicates report. This ensures that the parent and child suppliers don't register as potential duplicates. You can also exclude parts of supplier names using the Exclude From Name search option when you search for duplicates by supplier name.
Detect and Display Duplicate Suppliers	We expand the criteria you can use to detect potential supplier duplicates when you create new suppliers to include key pieces of supplier information. This enables you to more easily prevent duplicating supplier information while increasing the efficiency of supplier maintenance, improving the accuracy of your supplier records.	Suppliers	Manage Supplier Duplicates	We deliver a new Manage Duplicates task (secured to the Set Up: Supplier domain) that you can access from the related actions menu on suppliers, enabling you to select existing supplier records that aren't duplicates of the current supplier.
Detect and Display Duplicate Suppliers	We expand the criteria you can use to detect potential supplier duplicates when you create new suppliers to include key pieces of supplier information. This enables you to more easily prevent duplicating supplier information while increasing the efficiency of supplier maintenance, improving the accuracy of your supplier records.	Suppliers	Supplier Duplication Report Data Source	We deliver a new Supplier Duplication report data source (secured to the Reports: Supplier domain) that you can use to create custom reports for supplier duplicates.

Detect and Display Duplicate Suppliers	We expand the criteria you can use to detect potential supplier duplicates when you create new suppliers to include key pieces of supplier information. This enables you to more easily prevent duplicating supplier information while increasing the efficiency of supplier maintenance, improving the accuracy of your supplier records.	Suppliers	Potential Supplier Duplicates on Supplier Approvals	We add a new Possible Duplicates grid on these business processes: • Create Supplier • External Supplier Request • Supplier Request This enables approvers on the Supplier Event business process to view potential duplicate information in these fields: • Bank Account Information • Contact Information Email • Contact Information Phone • DUNS • Supplier Alternate Name • Supplier Contact Email • Supplier Name • Tax Information Note: We only display the grid on the business processes when you configure them for approval.
EIB Spreadsheet Layout for Import Web Services	With this release, we streamline the layout of Enterprise Interface Builder (EIB) spreadsheets for selected Import web services, making it easier for you to format the data for your Workday integrations.	Staffing	Import Staffing Data	With this update, Workday now hides the Overview and Header tabs on these EIB templates: • Import AddOnly Employee • Import Applicant • Import Assign Matrix Organization • Import Change Job • Import Contract Contingent Worker • Import Create Position • Import Edit Hiring Restrictions • Import Edit Position • Import End Contingent Worker Contract • Import Hire Employee • Import Move Workers by Organization • Import Remove Matrix Organization • Import Terminate Employee This makes it easier for you to avoid using a different header key for each row, causing the rows to run as separate jobs and leading to performance issues. We also replace the Header Key and Line Key columns with a new Spreadsheet Key column. You can add unique sequential numbers to the new column.

Expense Details for Journal Line Reporting	With Workday 2021R2, we expand your financial reporting capabilities and deliver a new report field that you can use to generate reports on expense report line details for journal lines.	Expenses	Expense Report Lines Linked to Journal Lines	We deliver a new Expense Report Line report field on the Transaction Lines Linked to Journal Lines business object (secured to the Public Reporting Items domain) that you can use in custom reports to: • Define calculated fields. • Include expense report details in their journal line reports.
Expense Report Work Area	Workday 2021R2 continues to improve the expense report work area user experience, ensuring you can quickly and efficiently manage expense reports awaiting your review.	Expenses	Grid View on Expense Report Work Area and Inbox	We now enable you to quickly review multiple expense report lines in a consolidated view. We automatically display expense reports in grid view on these tasks and report: • Approve Expense Report • Expense Report Work Area • Review Expense Report
Expense Report Work Area	Workday 2021R2 continues to improve the expense report work area user experience, ensuring you can quickly and efficiently manage expense reports awaiting your review.	Expenses	View Additional Columns on Expense Report Work Area	We display these new columns on the Expense Report Work Area report to provide additional insight into the expense reports in your queue: • Reason for Review, which displays the expense report event business process conditional rule that initiates the review. • Status, which indicates the role still needs to review and approve the expense report. • Sent Back Earlier, which indicates when the expense report was previously sent back. We also now truncate the time stamp for the Submission Date field, improving overall grid detail visibility.
Global Header Redesign	With Workday 2021R2, we enhance how we display the global header across Workday, improving usability.	Mobile User Experience	Global Header Redesign	With Workday 2021R2, we make it easier for you to navigate Workday. We: • Improve access to the Inbox on Workday mobile applications. • Increase the width of the search bar and move it to the center of each page. • Update icons and notification badging. • Update the user menu design.
Global Search Categories	Workday now enables you to search and find all information related to a functional area under the search category of the functional area. This eliminates the need to search within the All of Workday category, keeping your search results more relevant and reducing unrelated information.	Grants Management	Grants Search Category	You can now find all search results related to Grants Management in the Grants category when you use global search.

Global Search Categories	Workday now enables you to search and find all information related to a functional area under the search category of the functional area. This eliminates the need to search within the All of Workday category, keeping your search results more relevant and reducing unrelated information.	Customer Contracts	Revenue Search Category	You can now find all search results related to Revenue in the Revenue category when you run a global search in Workday.
Job Overlap for Positions	With this release, we improve job overlap configuration options for positions, providing you with increased flexibility and headcount accuracy. This also enables you to simplify the process of managing employees on assignments, reducing manual effort.	Staffing	Hiring Employees into Job Overlap on Vacating Events	You can now use these business processes to hire a worker into a position that's available for job overlap when the incumbent worker has already vacated: • Add Additional Job • Change Job • Contract Contingent Worker • Hire • Start International Assignment
Job Overlap for Positions	With this release, we improve job overlap configuration options for positions, providing you with increased flexibility and headcount accuracy. This also enables you to simplify the process of managing employees on assignments, reducing manual effort.	Staffing	Automatically Enable Job Overlap on Vacating Events	With this update, we deliver a new Automatically Select Is This Position Available for Overlap on Vacating Events check box on the Edit Tenant Setup - HCM task. When you enable the check box, Workday automatically selects the Is This Position Available for Overlap check box on these business processes: • Change Job • End Additional Job • End Contingent Worker Contract • End International Assignment • Termination This update doesn't apply to: • Corresponding web services for the business processes. • Change Job events that are initiated through the Review Employee Contract and Review Probation Period business processes.

Job Overlap for Positions	With this release, we improve job overlap configuration options for positions, providing you with increased flexibility and headcount accuracy. This also enables you to simplify the process of managing employees on assignments, reducing manual effort.	Staffing	Remove Overlap Check Box on Position Restriction Event Service	With this update, we deliver a new Remove Overlap Check Box on Position Restriction event service on these business processes: • Change Job • End Additional Job • End Contingent Worker Contract • End International Assignment • Termination The event service removes the Available for Overlap check box on position restrictions when you select these check boxes on the Edit Tenant Setup - HCM task: • Enable Job Overlap on Vacating Events • Enable Job Overlap on Position Restrictions This reduces manual effort by ensuring that Workday automatically removes the Overlap field on position restrictions when the worker is vacating the position.
Job Overlap for Positions	With this release, we improve job overlap configuration options for positions, providing you with increased flexibility and headcount accuracy. This also enables you to simplify the process of managing employees on assignments, reducing manual effort.	Staffing	Job Holder for Position Overlap Field	With this update, we add a new Job Holder for Position Overlap field in the Job Details report on worker profiles. This enables you to view whether the worker is the principal or overlapping worker for a position. You can use the Configure Optional Fields task to show or hide this field.
Job Overlap for Positions	With this release, we improve job overlap configuration options for positions, providing you with increased flexibility and headcount accuracy. This also enables you to simplify the process of managing employees on assignments, reducing manual effort.	Staffing	Enable Job Overlap for Vacating Positions	For clarity, we rename the Allow Job Overlap for Staffing check box on the Edit Tenant Setup – HCM task to Enable Job Overlap for Vacating Positions.

| Job Overlap for Positions | With this release, we improve job overlap configuration options for positions, providing you with increased flexibility and headcount accuracy. This also enables you to simplify the process of managing employees on assignments, reducing manual effort. | Staffing | Position Overlap Report Fields | We deliver a new Job Holder for Position Overlap report field on the Position and Job - All Staffing Models business object (secured to the Worker Data: All Positions domain). You can use the new report field in custom reports to identify if a worker is the principal worker or overlapping worker for a position.

We also update the:
• Available for Overlap report field description on the Position and Job - All Staffing Models business object to clarify that it returns true when you select the Available for Overlap check box on a position overview.
• Overlap Type report field on the Position and Job - All Staffing Models business object to return true when you select an overlap type on position restrictions. |

Organization Search and Prompts	With Workday 2021R2, we improve how you find organizations by enabling you to use prefixes to search more quickly.	User Experience	Organization Search	With Workday 2021R2, we save you time when searching for organizations in global search, reports, and tasks.
				We improve search performance when you use any of these criteria to search for organizations: • Leader ID • Leader Names (First and Last Names) • Organization Code • Organization ID • Organization Name • Organization Subtype • Primary Location of Organization You can also use these prefixes to search for organizations in global search: • sup • org You can use these prefixes to search for Organization ID, Organization Code, Organization Name, and Organization Subtype in global search: • cch: • company: • loch: • region: • costcenter: • ic: Organization leader is only searchable for staffing organizations on these prompts: *Matrix Organization • Supervisory Organization • Retiree Organization When you update organization details through Workday or a web service, your changes might not be immediately visible in search and can take up to an hour to display.

Put Unapplied Payments Back On Account	You can now put the full amount of an unapplied payment back on account even if you already applied it. This provides you with an improved reporting experience and greater flexibility. This also increases your productivity by removing the workaround involved in refunding the payment.	Customer Accounts	Customer Payment Applications	We continue to enhance the payment application process by now enabling you to put any previously applied payment fully on account when you: • Apply a customer payment manually. • Use automatic payment application and select the Put Unapplied Payments Fully On Account check box on the Create Customer Payment Application Rule task for Unapplied Payment Application Type. This eliminates tedious workarounds when a payment is applied incorrectly and needs to be refunded, improving efficiency to save you time and effort.
Report and Task Filters	With Workday 2021R2, we make it easier for you to keep track of where you are in Workday. Instead of displaying report and task filter prompts on a separate page, we display a pop up where you can quickly specify filters and easily return to and complete your task.	User Experience	Report and Task Filter Focus	With Workday 2021R2, we make it easier to complete tasks in Workday. When you access a report or task filter prompt, Workday grays out the main task or report and displays the prompt in focus on the screen. When you complete your selection and dismiss the prompt, Workday brings the main task or report back into focus.
Step Types on Business Process Definitions	With this release, we no longer enable you to change the step types of existing steps on a business process definition, preventing potential errors.	Business Process	Business Process Step Type	We prevent potential data corruption in your tenant by no longer enabling you to change the step type of existing steps when you edit a business process definition. Some existing steps in a business process definition may contain heavy configuration, such as an Integration step. Preventing step type changes can help you to avoid errors. When you want to change the step type, Workday recommends that you remove the step and add a new step with a new step type on the business process definition.
Table-Viewing Options	With Workday 2021R2, we improve performance and usability for read-only tables with table-viewing options enabled.	User Experience	Fixed Column Headers	We provide greater context as you navigate Workday data by now supporting fixed column headers on read-only tables when you enable table-viewing options.
Time Tracking - Miscellaneous Enhancements		Time Off and Leave Time Tracking	View Absence Balances Button	With this update, we move the View Absence Balances button on the time entry calendar to the Actions menu, providing a more consistent user experience.

| Time Tracking Report Data Source Filtering | With this release, we make it easier for you to run Time Tracking reports by updating the All Time Blocks and Time Off Entries report data source so that you can choose to include terminated workers in reports. | Time Off and Leave

Time Tracking | All Time Blocks and Time Off Entries Report Data Source | We add a new Include Terminated Workers check box on the All Time Blocks and Time Off Entries report data source (RDS) that you can use to include terminated workers in reports that use the data source.

We also add a new All Time Blocks and Time Off Entries by Cost Center RDS filter that you can use to analyze time and time off data by cost center instead of by supervisory organization. |
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| User Interface Display and Behavior | Workday 2021R2 improves the user experience, making it easier for you to select, view, enter, and export data in Workday. | User Experience | Guided Task Editor | With Workday 2021R2, we continue to enhance the usability of the Guided Task Editor. We:
• Enhance the icons, position, and size of additional actions such as Print, Export, and Collapse/Expand.
• Improve how we display different sections.
• Modify how you navigate using the scrollbar by adding a vertical scrollbar, enabling you to access sections beyond the left navigation bar.
• Update the display and focus of navigation icons. |
| User Interface Display and Behavior | Workday 2021R2 improves the user experience, making it easier for you to select, view, enter, and export data in Workday. | User Experience | Calendar Display | With Workday 2021R2, we improve the usability of the Calendar. We now display the More icon on each calendar day cell when there's at least 1 activity band item in the cell. When you click the More icon, Workday now displays additional details. |
| Viewer Access for Discovery Boards | Workday enhances the discovery board experience by enabling editors to make some controls available to viewers at either sheet or viz level. Viewers can then interact with the discovery board data by changing the values of built-in prompts and filters exposed at sheet or viz level. | Reporting and Analytics | Viewer Exposed Controls | When you create or edit a discovery board, you can now expose built-in prompts and filters in view mode, providing viewers control over the data returned. Exposed controls are configurable inputs that provide viewers some data analysis capabilities when they view a discovery board. |

| Workday Search | With Workday 2021R2, we continue to enhance predictive functionality for Workday search, saving you time and effort. | User Experience | Predictive Search and Common Search Category | With Workday 2021R2, we improve the display order of search results when you enter search terms using predictive search or use the Common search category.

You can now use any of these criteria to search for:
• Academic Unit Hierarchy Code
• Academic Unit Hierarchy Name
• Academic Unit ID
• Academic Unit Name
• Custom Report Definition Name
• Gift Hierarchy ID
• Gift Hierarchy Name
• Gift ID
• Gift Name
• Grant Hierarchy ID
• Grant Hierarchy Name
• Grant ID
• Grant Name
• Location Name
• Manager ID
• Organization Code
• Organization Name
• Project ID
• Project Name
• Report Name
• Task Name
• Worker in General Name Display Type |
| Workday Search | With Workday 2021R2, we continue to enhance predictive functionality for Workday search, saving you time and effort. | User Experience | Search 20-Term Limit | We improve search performance across Workday by introducing a new 20-term search limit. When your search criteria includes more than 20 terms, Workday doesn't return search results and prompts you to refine your search by using a smaller number of terms. |